

Matrix of Modules, Tasks, Tools, and Resources for Sustaining Lifespan Respite Systems

Module	Task(s)	Tools	Resources
Planning to Plan	<ul style="list-style-type: none"> • Create a structure to guide the process • Determine planning team membership • Create a timeline for completing the process 	<ul style="list-style-type: none"> • Planning to Plan PowerPoint presentation on CD-Rom • Worksheet 1: Sustainability Workplan 	<ul style="list-style-type: none"> • Planning to Plan Module
I: Building a Sustainable Initiative Where are we now? The Self-Assessment	<ul style="list-style-type: none"> • Inform participants about the Key Elements of Sustainability and the Sustainability Framework • Introduce the Self-Assessment Tool and provide context • Complete Sustainability Self-Assessment • Discuss and debrief Sustainability Self-Assessment Tool 	<ul style="list-style-type: none"> • Module 1 Introductory PowerPoint presentation on CD-Rom • Sustainability Self-Assessment Tool 	<ul style="list-style-type: none"> • Previous strategic planning documents
II: Developing a Vision and Results Orientation What do we want to sustain? What do we mean by sustainability?	<p>Develop Logic Model to:</p> <ul style="list-style-type: none"> • Define what you mean by sustainability • Clarify sustainability goals • Identify measures to track progress 	<ul style="list-style-type: none"> • Module II Introductory PowerPoint on CD-Rom • Worksheet 1: Self-Assessment Summary—Vision and Results Orientation • Worksheet 2: Clarifying Vision and Desired Results • Worksheet 3: Identifying Conditions and Causes • Worksheet 4: Prioritizing Existing Strategies and Activities • Worksheet 5: Considering New 	<ul style="list-style-type: none"> • Mission and/or vision statements • Existing logic models • Community and initiative level data • Planned or completed evaluations <p>Worksheets 4, 5 and 6 are particularly helpful to coalitions or collaborative groups engaged in a data-driven review of existing strategies and activities and consideration of new strategies and activities.</p> <p>Worksheets 4 and 5 provide a</p>

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		Strategies and Activities <ul style="list-style-type: none"> • Worksheet 6: What do you Want to Sustain (Scale and Scope) • Worksheet 7: Identifying Measures of Effect • Worksheet 8: Prioritizing Measures of Effect • Worksheet 9: Identifying Measures of Effort • Worksheet 10: Prioritizing Measures of Effort • Worksheet 11: Identifying Indicators • Your Logic Model 	decision-making matrix. Worksheet 6 provides space to capture consensus thinking regarding which strategies and activities to sustain.
III: Creating a Strategic Financing Plan How much does it cost? How will we finance it?	Clarify Financing for What? <ul style="list-style-type: none"> • What types of services? • How many caregivers and/or care recipients? • What level of quality? 	<ul style="list-style-type: none"> • Module III Introductory PowerPoint on CD-Rom • Worksheet 1: Sustainability Self-Assessment Results—Strategic Financing • Worksheet 2: Financing for What? 	<ul style="list-style-type: none"> • Budget information; data on costs of services • Information on current funding sources • Information on how various funding streams are currently allocated in your community • TFP’s searchable Federal Funding Database http://www.financeproject.org/fedfund_search.cfm ARCH resource links: <ul style="list-style-type: none"> • <i>Federal Funding and Supports for Respite: Building Blocks for Lifespan Respite Systems, 2012</i> http://www.lifespanrespite.memberlodge.org/Federal_Funding_Guide • <i>Using Federal Funds for Respite: Select Examples from States and</i>
	Estimate Fiscal Needs: How much will it cost to accomplish your sustainability goals?	<ul style="list-style-type: none"> • Worksheet 3: How much do you need? 	
	Map Current Spending: What resources do you currently have?	<ul style="list-style-type: none"> • Worksheet 4: Identify Current Resources 	
	Analyze Gaps: What’s the gap between how much you have and how much you need?	<ul style="list-style-type: none"> • Worksheet 5: Assess Your Funding Gaps 	
	Develop Financing Strategies <ul style="list-style-type: none"> • Present financing options 	<ul style="list-style-type: none"> • Worksheet 6: Evaluate Potential Funding Sources and Financing Strategies 	

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	<ul style="list-style-type: none"> Evaluate options Develop recommendations 		<p><i>Community-based Programs.</i> http://archrespite.org/images/Webinars/Using_Federal_Funds_for_Respite.pdf</p> <ul style="list-style-type: none"> <i>Home and Community-Based 1915(c) Medicaid Waivers for Respite: State-by-State Tables, 2011 and State Funding Streams for Respite across the Lifespan, 2011.</i> http://www.lifespanrespite.memberlodge.org/FundingCompilations <i>Funding Sustainability for Lifespan Respite Programs, Part II: State Examples, Webinar, August 14, 2012.</i> http://archrespite.org/webinars-and-teleconferences/funding-sustainability-part-ii <p>Worksheets 3 and 4 are critical tools to determine the cost of sustaining coalition’s or Lifespan Respite project’s work. Sustainability planning teams should use the scale and scope decisions made during Module II discussions to determine the costs of sustaining priority work.</p> <p>Worksheet 4 asks planning team members to reconsider the coalition’s available resources from the lens of the strategies and activities the funds can support. Through this approach, the sustainability team has data to discuss resource needs by strategy.</p>
IV: Building Organizational Capacity and Community Support	Identify Priorities such as: <ul style="list-style-type: none"> Community engagement Strategic communications Leadership development Governance and management 	<ul style="list-style-type: none"> Module IV Introductory PowerPoint on CD-Rom Worksheet 1: Environmental Scan Worksheet 2: Self-Assessment Summary—Adaptability to Changing Conditions 	<ul style="list-style-type: none"> Information and analysis on the political and economic environment Information on community demographics and needs <p>Worksheets 2, 4, and 6 provide tools to guide further discussion about the</p>

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	Design Strategies to accomplish priorities	<ul style="list-style-type: none"> • Worksheet 4: Self-Assessment Summary—Broad-Based Community Support • Worksheet 6: Self-Assessment Summary—Key Champions • Worksheet 8: Self-Assessment Summary—Strong Internal Systems • Worksheet 3: Strategies Related to Adaptability to Changing Conditions • Worksheet 5: Community Engagement Strategies • Worksheet 7: Strategies for Cultivating Key Champions • Worksheet 9: Strategies for Strengthening Internal Systems • Worksheet 10: Prioritize Strategies Related to Community Support and Organizational Capacity 	<p>coalition’s or Lifespan Respite project’s strengths and weaknesses as they relate to core non-fiscal elements of sustainability.</p> <p>Worksheet 10 guides discussion of specific strategies that can boost Community Support and Organizational Capacity.</p>
<p>V: Developing and Writing the Plan</p> <p>Putting it all together</p>	Write the Plan	<ul style="list-style-type: none"> • Module V Introductory PowerPoint on CD-Rom • Sustainability Plan Outline • Worksheet 1: Priority Strategies and Milestones • Worksheet 2: Sustainability Workplan Worksheet 	<ul style="list-style-type: none"> • Previous proposals and public relations materials • Completed worksheets from other modules • Organization chart, recent audit statements and other documents for the appendix <p>While the Sustainability Plan outline sample in the workbook portrays a traditional written report, planning teams are encouraged to use a format suited to their organizational context and culture.</p>

